PTAC

Alberta Upstream Petroleum Research Fund

PTAC

26-RRRC-RFP-03

Drilling Fluids Searchable Catalogue

BUDGET: UP TO $50,000[1]

RFP PUBLICATION DATE: MAY 1, 2026

PROPOSAL SUBMISSION DEADLINE: JUNE 17, 2026 (5:00 PM MT)

[1] Budget is an upper cap.
Proponents are encouraged to submit competitive pricing.

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1) Background and Rationale

Drilling fluids are foundational to safe and efficient well construction. They support essential functions including transporting cuttings, maintaining well control and wellbore stability, cooling and lubricating the drill string, and minimizing formation damage. A number of additives are used to ensure the fluid properties are compatible with the geological conditions encountered during drilling. These additives affect drilling waste characteristics such as pH, salinity and toxicity that must be properly managed.

The waste stream that is generated from drilling operations must be characterized, managed, and documented in accordance with Alberta's Directive 50 requirements.

In order to close a drilling waste disposal area in Alberta (i.e. obtain a reclamation certificate), Operators must follow the *Assessing Drilling Waste Disposal Areas: Compliance Options for Reclamation Certification (March 2014)*. As part of the compliance option checklists identified in the document, drilling mud additives must be identified and described in the Phase 1 Environmental Site Assessment (ESA). If all the additives cannot be described, a Phase 2 ESA is required. Industry experience has shown that many Phase 1 ESAs are failing solely because drilling fluid additives cannot be clearly identified or described. This is resulting in unnecessary Phase 2 ESAs, increased costs, project delays, and in some cases disturbance of previously reclaimed sites (e.g., clearing of mature forest vegetation).

The *Assessing Drilling Waste Disposal Areas: Compliance Options for Reclamation Certification (March 2014)* notes that the Petroleum Services Association of Canada maintains a list of historic additives and will assist in identifying unknown additives and that the service can be accessed at http://www.psac.ca; however, this service does not appear to be currently available and not all consultants have access to this historic list.

A recurring challenge in the Phase 1 ESA is that functionally similar drilling fluid additives are often sold under multiple trade names by different vendors, and are described inconsistently across vendor technical sheets, field tickets, and assessment documentation. This creates avoidable ambiguity when teams need to translate 'what was used' into a consistent description of function, key actives/chemical identity (at a high level), and relevant handling/waste considerations.

The Alberta Upstream Petroleum Research Fund (AUPRF) is seeking proposals to develop a curated, publicly accessible Drilling Fluids Catalogue ("the catalogue").

The catalogue must be provided in a simple, searchable format (e.g., Searchable PDF catalogue supported by an Excel source file) that is easily accessible to environmental

consultants without login or paywall restrictions. The catalogue is intended to act as a neutral translation layer connecting vendor trade names to standardized chemical/function metadata, supported by direct links to authoritative public references such as Safety Data Sheets (SDS), vendor technical sheets, and available analytical data where applicable. In addition to SDS and product data sheets, analytical data (where available) can provide valuable supporting information for reviewers, particularly in understanding environmental characteristics of drilling fluid additives.

The catalogue will also include practical environmental/testing flags relevant to drilling operations, grounded in referenced sources rather than opinion or endorsement.

2) Benefits to Albertans

The primary audience for the catalogue is environmental consultants completing Phase 1 ESAs for drilling waste disposal areas (upstream oil & gas operations). This project is intended to deliver measurable value to producers and service providers by reducing ambiguity, rework, and cycle time in Phase 1 ESA workflows that rely on accurate additive identity.

2.1 Operational efficiency and risk reduction (Drilling & Completions teams)

- Faster technical interpretation: Users can search for a trade name and immediately retrieve standardized functional class, key actives (as publicly disclosed), and linked primary sources (SDS/technical sheet).
- Reduced reliance on institutional memory: Provides a consistent reference layer that is maintainable and accessible over time.

2.2 Reduced rework (Environmental & Waste teams)

- Improved ability to identify and describe drilling fluid additives in Phase 1 ESAs
- Reduce unnecessary escalation to Phase 2 ESAs caused by unknown or poorly described additives
- Support more consistent and defensible Phase 1 ESA documentation: Entries are anchored to public primary sources and change-logged, supporting consistent internal review and external scrutiny.

2.3 Improved HSE and chemical stewardship (SDS/WHMIS as the facts layer)

- Provide access to current SDS information for reference
- Optional WHMIS/GHS quick view: Where feasible, provide a concise hazard summary (from SDS) for rapid HSE reference.

2.4 Supply-chain resilience and substitution clarity (without performance claims)

- Identify similar additives based on function (without implying performance equivalence)
- No recommendations / Neutrality statement: The catalogue will be a neutral reference tool. It will not rank, recommend, or endorse products, and will not replace regulatory requirements or professional judgment.

3) Project Objectives

Proposals should address how the work will meet the following objectives:

1. Establish a 'common language' for drilling-fluid additives by translating trade names into standardized functional classes and key actives/identity fields, grounded in public SDS and vendor technical sheets
2. Support environmental consultants in completing Phase 1 ESAs by improving identification of drilling fluid additives
3. Provide neutral, consistent descriptions of additives across different trade names.

4) Scope of Work

The catalogue must include both current and historical drilling fluid additives used in Western Canada, going back as far as records are reasonably available (ideally to the 1950s or earlier where possible).

The proponent will be expected to define, build, populate, and validate a curated catalogue (i.e., Searchable PDF catalogue supported by an Excel source file). At a minimum, the scope should include the following work elements:

- Define and implement taxonomy (functional classes, base system compatibility, identity approach)
- Populate a dataset covering commonly used drilling-fluid additives that have been encountered in Western Canada since the 1950's (or earlier where possible)
- Ensure each entry includes standardized metadata and direct links to public primary sources (SDS/vendor technical sheet) plus referenced environmental/testing flags
- Ensure each additive entry includes, where available, not only SDS and product data sheets but also relevant analytical data (e.g., metals, trace elements), particularly for additives that may be applied to the ground (e.g., lost circulation materials or LWD-related additives)
- Provide a practical validation approach (SME sampling review) to confirm consistency and neutrality
- Searchable PDF and filterable Excel spreadsheet (including synonyms/variants) and filter by functional class, vendor, key actives, base system compatibility, and flags

- Entry-level traceability: source links, attribution, SDS revision date (where available), and 'last verified' timestamps

5) Out of Scope

The following items are explicitly out of scope for this RFP:

- No product performance rankings, endorsements, or procurement recommendations
- No non-public or confidential formulation details; no reverse-engineering of proprietary compositions
- No regulatory determinations; flags are informational and must be referenced

6) Deliverables

Deliverables are expected to be provided across the following phases. Proponents may propose refinements, but should address each phase explicitly.

Phase 1 – Catalogue Development

- Develop a searchable drilling fluids catalogue in a simple, user-friendly format (e.g., Searchable PDF catalogue supported by an Excel source file)
- Ensure the catalogue is publicly accessible without login restrictions
- Include clear, plain-language descriptions suitable for use in Phase 1 ESA reporting

Phase 2 — Validation & Rollout

- SME sampling review process and remediation of issues
- Orientation/demo and structured feedback mechanism
- One-page PDF 'cheat sheet' export generated from system-of-record data
- Summary of data coverage and identified gaps in available additive information

Data Requirements

Each additive entry should include where available:

- Trade name(s) and synonyms
- Functional category (i.e., purpose of additive)
- General chemical description (non-proprietary)
- Links to SDS and product data sheets
- Relevant analytical data (e.g., metals, trace elements) where available
- Analytical data (where available), including metals and trace elements (MTX) Note: MTX and trace element data have been commonly available since the 1990s and are generally required for more recent applications (post-2012).
- Hydrocarbon presence: May be indicated as present/absent or derived from SDS/product data sheets

- Salinity relevance: Detailed salinity data is not required; however, identification of whether an additive is salt-based should be included where relevant (e.g., for salt load calculations)
- Practical notes relevant to environmental assessment and Phase 1 ESA reporting

7) Success Criteria

AUPRF will consider the project successful if the delivered catalogue are demonstrably usable for producer workflows and environmental/waste teams), and the content is consistently structured, traceable, and neutral.

Minimum Measurable Acceptance Targets (Suggested):

- **Usability:** The catalogue is clear, searchable, and enables users (e.g., environmental consultants) to readily identify additive function, description, and supporting source information (e.g., SDS links)
- **Content Quality:** Entries are consistently structured and, where available, include at least one credible public source reference (e.g., SDS or vendor documentation).
- **Neutrality:** The catalogue contains no endorsements, rankings, or performance claims, and maintains a neutral, factual tone
- **Practicality:** The catalogue is provided in a simple, accessible format (searchable PDF supported by an Excel source file) that can be easily used in Phase 1 ESA workflows.
- **Maintainability:** The catalogue can be updated periodically by PTAC, as needed, using a straightforward and low-effort process
- **Key Outcome:** The catalogue supports improved identification of drilling fluid additives and contributes to reducing the number of sites requiring Phase 2 ESAs due to unknown additives

Timeline: The project is expected to be completed within six (6) months from the date of contract execution.
Budget: $50,000 is the upper cap and proponents are encouraged to submit competitive pricing.

8) Proposal Requirements

- Presents information on project team and relevant qualifications/experience.
- Presents a clear understanding of project objectives and deliverables.
- Presents methodology, work plan, timeline and budget.
- Provides proof of insurance.
- Please refer to INSTRUCTIONS FOR PROPOSAL SUBMISSIONS for more information on Proposal Requirements.

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AUPRF 2026 Request for Proposals

INSTRUCTIONS FOR PROPOSAL SUBMISSIONS

MAY 2026

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Instructions for Proposal Submissions
AUPRF 2026 RFPs

1 Purpose & Scope

These instructions apply to all competitive solicitations funded by the Alberta Upstream Petroleum Research Fund (AUPRF) and administered by PTAC Petroleum Technology Alliance Canada. They define how Proponents must prepare and submit proposals, how proposals are evaluated, the timelines for decisions and notifications, and key commercial and legal terms applicable to AUPRF-funded projects.

2 Submission – Content Requirements

2.1 Proponent & Company Information

- Legal name and address
- Primary contact name, title, email, and phone
- Brief company overview and relevant services

2.2 Technical Proposal

- Understanding of the problem statement and scope
- Proposed methodology and approach
- Work plan, milestones, and schedule
- Team composition; max 2-page bios/CVs with roles and expertise

2.3 Financial Proposal

- Itemized cost breakdown (e.g., labour categories and rates, materials, travel, subcontractors)
- Proposed milestone-based payment schedule (payments tied to deliverables)
- Leveraged funding

2.4 Formatting and Page Limits

Unless otherwise specified in a particular RFP, no strict page limits apply; include the content necessary to enable a thorough assessment.

3 Submission — Method & Logistics

Submit by email to info@ptac.org with subject line: *AUPRF – RFP ID – Proponent Company Name*. **Proposals submitted by other means will not be accepted.**

- Deadline: Proposals must be received on or before the RFP deadline indicated in each RFP document; late submissions will not be considered.

- File format: A single combined PDF is preferred, plus any required spreadsheets or forms specified in the RFP.
- Validity: Proposals must remain irrevocable and open for acceptance for 90 days from the submission deadline.
- Questions & FAQs: Refer to the AUPRF call for proposals landing page and any RFP-specific instructions for updates and clarifications.

4 Eligibility, Legal & Commercial Terms

- PTAC reserves the right to accept or reject any Proposal, in whole or in part, and to cancel or amend an RFP without liability.
- Proponents are responsible for all costs associated with preparing and submitting their Proposals.
- Confidentiality applies to information provided by PTAC; Proponents may be required to sign a non-disclosure agreement. Proposals will be kept confidential and will be accessed only by evaluators.
- Intellectual property (IP) arising from AUPRF projects may be owned by AUPRF funders, or AUPRF funders receive a royalty-free operational use right. No other IP ownership or sharing options (if IP is being generated) are acceptable.
- Minimum insurance: Commercial General Liability (CGL) of $5,000,000 and Professional Liability of $2,000,000.
- Disclosure of intent to subcontract and any actual or potential conflicts of interest is required.
- Governing law: Province of Alberta, Canada.

5 Evaluation Criteria & Process

5.1 Scored Criteria and Weights

Criterion	*Weight*
Technical Approach	30%
Relevant Experience	30%
Cost	25%
Leveraged Funds from Other funders	5%
Team Qualifications	10%

5.2 Screening & Completeness

Proposals are first screened for completeness and compliance (deadline, required sections, and required disclosures). Incomplete or non-compliant Proposals may be removed from further consideration at PTAC's discretion.

5.3 Committee Review, Scoring & Deliberation

The relevant AUPRF technical committee reviews Eligible Proposals. Committee members score Proposals using the standardized scoring sheet before a deliberation meeting, where compiled results are discussed, and recommendations are confirmed.

PTAC may request clarifications, additional information, or presentations from Proponents to support evaluation before final ranking.

6 AUPRF Review & Communication Timelines[1]

The following applies to AUPRF RFPs for **Ecological Research Planning Committee (ERPC), and Reclamation Remediation Research (RRRC)**, unless a specific RFP states a different schedule:

Step	*Date*
1. **RFP Release**	May 1, 2026
2. **Submission of Questions**	May 22, 2026
3. **Answers to Questions Posted** on PTAC Website	May 29, 2026
4. **Proposal submission deadline**	**June 17, 2026** **5 pm Mountain Time**
5. **Decision ratification**	July 30, 2026, or sooner
6. **Award notifications**	July 2026
7. **Target project start**	Summer 2026 (unless otherwise specified)

7 Communication

- All communications by the proponent to PTAC should be directed to info@ptac.org and AUPRF2026 RFPs should be included in the subject line.
- PTAC will notify the Proposal's primary contact by email of the outcome (award or non-award).
- Unsuccessful Proponents may request high-level feedback on strengths and areas for improvement.
- Public Communications: PTAC/AUPRF may publish award highlights after contract execution.

8 Contracting, Payments & Reporting

- A standard AUPRF Funding Agreement will be issued to successful Proponents for review and execution.
- Payments are quarterly milestone-based and tied to accepted deliverables, as specified in the Funding Agreement.
- Executed agreements are retained in the AUPRF contracts repository managed by PTAC.

[1] AUPRF 2026 RFPs for Well Decommissioning Research (WDRC), Water Innovation Planning (WIPC), and Air Research Planning (ARPC) **follow a different timeline and deadline**.

9 Compliance & Reserved Rights

PTAC may amend or cancel an AUPRF RFP at any time; any changes will be communicated to all prospective Proponents. Proponents must comply with all instructions, including confidentiality, insurance, subcontracting disclosures, and conflict-of-interest requirements.

10 Proponent Checklist

- Company information (legal name, address, contacts, overview)
- Technical proposal (approach, work plan, schedule, team bios/CVs)
- Financials (itemized costs; milestone-based payment plan, leveraged funding)
- Disclosures (subcontracting intent; conflicts of interest)
- Insurance confirmation (CGL $5M; Professional Liability $2M)
- Submission format (single PDF + required forms); deadline; 90-day validity

11 Legal Conditions

11.1 Non-Binding Solicitation; No Obligation to Award

This Request for Proposals (RFP) is not an offer to contract. No contractual, quasi-contractual, fiduciary, or other legal obligations of any kind are created by this RFP or by any submission, communication, or conduct of PTAC unless and until a written Funding Agreement is executed by duly authorized representatives of PTAC and the successful Proponent. PTAC may cancel, amend, or suspend this RFP at any time without liability.

11.2 PTAC's Reserved Rights

Without limiting any other rights, PTAC may, in its sole discretion and without liability: (a) accept or reject any or all Proposals; (b) accept a Proposal in whole or in part; (c) waive non-material irregularities; (d) seek clarifications; (e) negotiate changes to scope, schedule, and pricing with one or more Proponents; and (f) cancel this RFP at any time. The lowest-priced Proposal will not necessarily be selected.

11.3 No Claim for Compensation; Bid Costs

Each Proponent is solely responsible for all costs associated with preparing and submitting its Proposal, as well as any related activities. PTAC shall not be liable for any such costs or damages, whether or not the Proponent is selected for award.

11.4 Limitation of Liability

To the maximum extent permitted by law, PTAC shall not be liable to any Proponent for indirect, incidental, consequential, special, punitive, or exemplary damages, loss of profit, loss of opportunity, or loss of reputation arising out of or related to this RFP, the evaluation process, or any decision to award or not award funding, even if advised of the possibility of such damages. Any direct liability of PTAC to a Proponent is strictly limited to the reasonable, proven out-of-pocket costs of preparing the Proposal, which the parties agree is disclaimed by Section 4.

11.5 Verification and Clarifications

PTAC may request clarifications, additional information, or presentations from any Proponent and may verify any information contained in a Proposal through interviews, reference checks, third-party sources, or site visits. Failure to respond promptly may result in disqualification.

11.6 Grounds for Disqualification

PTAC may, at any time, disqualify a Proposal or rescind a selection if: (a) the Proposal is late, incomplete, or non-compliant; (b) the Proponent fails to disclose or address an actual or potential conflict of interest; (c) the Proposal contains misrepresentations or misleading information; (d) the Proponent engages in collusion, unfair competition, improper influence, lobbying outside the authorized contact, or attempts to obtain confidential information not publicly available; or (e) adverse information materially affecting the Proponent's qualifications comes to PTAC's attention.

11.7 Proponent Representations & Warranties

By submitting a Proposal, the Proponent represents and warrants that: (a) the Proposal is accurate, complete, and not misleading; (b) all proposed work product will not infringe intellectual property or other rights of third parties; (c) the Proponent and proposed subcontractors are duly qualified and in good standing; and (d) it will maintain the insurance required by the RFP and Funding Agreement.

11.8 Confidentiality; Use and Disclosure

Information provided by PTAC in connection with this RFP is confidential and may be used solely for Proposal preparation and evaluation. Proponents must not disclose such information to any third party except their team members, advisors, or subcontractors who have a need to know and are bound by confidentiality obligations no less protective. PTAC may disclose Proposals to its funders, technical committees, advisors, and partners for evaluation and administration and may make disclosures as required by law or court/government order.

11.9 Intellectual Property & License to Use

Subject to the Funding Agreement, IP arising from the Project may be owned by AUPRF funders, or funders will receive a perpetual, royalty-free right to use the IP in their operations without additional compensation. Proponents must ensure they have all the rights necessary to grant such ownership or licenses. If IP is generated by the proposal/project, no other IP ownership or sharing options are acceptable. If IP is not generated by this project, this provision is unnecessary.

11.10 Subcontracting

The Proponent must disclose its intent to subcontract any portion of the work. PTAC reserves the right to approve or reject proposed subcontractors. The Proponent remains fully responsible for all subcontracted work.

11.11 Proposal Validity

Proposals must remain irrevocable and open for acceptance for 90 days after the submission deadline.

11.12 Acceptance Not a Waiver

PTAC's acceptance of a Proposal, or its failure to identify deficiencies, does not waive any requirement of the RFP or Funding Agreement and does not relieve the Proponent from responsibility for compliance or performance.

11.13 Order of Precedence; Entire Agreement

In case of conflict, the following order of precedence applies: (1) the executed Funding Agreement (including schedules), (2) the specific RFP (including addenda), (3) these Proponent Instructions, and (4) the Proposal. The executed Funding Agreement constitutes the entire agreement for project performance.

11.14 Governing Law and Forum

This RFP and any related dispute are governed by the laws of the Province of Alberta and the federal laws of Canada applicable therein, without regard to conflict-of-laws rules. The parties attorn to the exclusive jurisdiction of the courts of Alberta, sitting in Calgary.

11.15 Insurance & Indemnities

At a minimum, the Proponent shall maintain CGL of $5,000,000 and Professional Liability of $2,000,000, as well as any other insurance required by the Funding Agreement. Proponents will indemnify and hold harmless PTAC, its officers, directors, employees, and agents from third-party claims arising out of the Proponent's acts or omissions in connection with the Proposal or the Project, subject to the Funding Agreement.

11.16 Addenda and Questions

Only written addenda issued by PTAC form part of the RFP. Proponents are responsible for monitoring the RFP communication channel (the PTAC website) and ensuring their Proposal reflects all addenda.